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Valarie L. Benson

Sept. 19, 2003

Valarie L. Benson

Date

Signature

**IN THE UNITED STATES PATENT AND TRADEMARK OFFICE**

First Named Inventor: John J. Koresko V

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Conf. No.: 1681

§ Group Art Unit: 3624

Appln. No.: 10/086,924

§ Examiner: Kelly Scaggs Campen

Filing Date: February 28, 2002

§ Attorney Docket No.: 10717-1U1

Title: SYSTEM AND METHOD FOR CREATING A DEFINED BENEFIT PENSION PLAN  
FUNDED WITH A VARIABLE LIFE INSURANCE POLICY AND/OR A VARIABLE  
ANNUITY POLICY

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GROUP 3600

**SUPPLEMENTAL INFORMATION DISCLOSURE STATEMENT**  
**UNDER 37 C.F.R. §1.97(b)**

Enclosed are copies of each of the documents listed on the attached Information Disclosure Citation Form PTO/SB/08A, which may be material to the patentability of this application and/or for which there may be a duty to disclose in accordance with 37 C.F.R. §1.56.

The filing of this Information Disclosure Statement shall not be construed as an admission that any of the listed documents constitutes prior art, nor as an admission against interest in any manner.

No fee is believed to be due in connection with the filing of this Information Disclosure Statement since it is being filed before the mailing date of the first Office Action on the merits. However, the Commissioner is hereby authorized to charge any deficiencies or credit any overpayments to Deposit Account No. 50-1017 (210717.0002).

It is respectfully requested that this Information Disclosure Statement and the documents listed on the attached Form PTO/SB/08A be considered and acknowledged by the Examiner in connection with the above-identified patent application, be made of record therein, and that the listed documents be cited in the issued patent.

Respectfully submitted,

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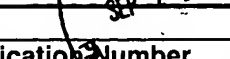
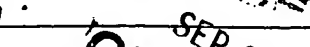
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Enclosures



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|---|---|----|---|---|---------------------|
| Form PTO/SB/08A   |   |    |   |  Complete if Known |                     |
| <b>INFORMATION DISCLOSURE<br/>STATEMENT BY APPLICANT</b><br><br>(use as many sheets as necessary) |   |    |   | Application Number  | 10/086,924          |
|   |   |    |   | Filing Date   | February 28, 2002   |
|   |   |    |   | First Named Inventor  | John J. Koresko V   |
|   |   |    |   | Group Art Unit  | 3624                |
|   |   |    |   | Examiner Name   | Kelly Scaggs Campen |
|   |   |    |   | Attorney Docket Number  | 10717-1U1           |
| Sheet   | 1 | of | 1 |                  |                     |

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| OTHER PRIOR ART - NON PATENT LITERATURE DOCUMENTS |   |                |
|---|---|----------------|
| Exr<br>Initials                                   | Include Name of first Author (in CAPITAL LETTERS), title of the article (where appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), volume-issue number(s), page(s), date (in parentheses). If a book, also include publisher and city and/or county where published. | T <sub>1</sub> |
|   | PCT International Search Report for PCT/US02/18228, mailed September 5, 2003, 6 pages   | X              |
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|-----------------------|--|--------------------|--|
| Examiner<br>Signature |  | Date<br>Considered |  |
|-----------------------|--|--------------------|--|